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MMARS Policy: System Automation

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Document Catalog Management – Remarking/Purge Policy

Executive Summary

This policy defines the management of documents in MMARS with respect to nightly re-marking of documents and the purging of rejected documents.

Considerations

The MMARS Document Catalog serves the dual purposes of providing a repository of historical documents and access to document activity, as previously provided in “open item” tables.

The following automated processes will assist the management of the document catalog:

Purging Rejected Documents

Over a period of time, documents that are rejected in the system accumulate in the document catalog and could potentially cause performance problems as well as making the management of the catalog more difficult for departments. Purging of certain rejected documents would assist with this effort.

Remarking

The remarking process re-edits certain documents within the MMARS nightly cycle in a “Reject” status and processes to a Final status.

Policy

Purging

In an ongoing attempt to assist departments in their management of the MMARS document catalog, a routine production feature has been activated. This feature is the monthly purge of rejected documents over 60 days old. The regular schedule of MMARS Document Catalog purge will be executed in concert with the monthly accounting period close process. The purge schedule may be adjusted to accommodate annual Closing/Opening activities. The need to resume this procedure is clearly indicated by the volume of rejected documents that exceed 60 days from original entry date. Departments should institute a periodic review of rejected documents in the Document Catalog. Departments who wish to retain any document, which would qualify for the monthly purge action, should place the document in a Held status prior to the scheduled purge.

Reference the [How to Search the Document Catalog](#) Job Aid.

The following documents are excluded from the purge:

AR, CA, CD, ER, IE, IET, IT, ITA, ITI, OT, TD, TT, WR, PREXP, PRLNP, PRLVP, and PRRV.

Remarking

For a number of years, it has been the practice of this office to execute jobs within the MMARS nightly cycle that look at certain documents entered by departments, which were in a "Reject" status. The nightly jobs would, in effect, re-edit the document to determine if the original reason for the rejected status had been resolved, and if all on-line edits passed. The document will go to a "Final" status, including documents entered by staff that has a "user" level role (the user level role does not allow staff to process documents to a "Final" status). Only a limited number of documents will now be included in the re-marking process, in order to support the controls necessary for the management of e-signature.

The following documents will be eligible for nightly remarking: **CR, RF1, WR, GXM, PRLIF, and PRLDE.**

All other documents in a rejected status will not be remarked, and department personnel will be responsible for reviewing and managing these rejected documents.

Archiving

Over time the size of the Document Catalog will require that aged documents be archived. This policy document will be amended at a future point in time to incorporate that process.

Internal Controls

Department Internal Control procedures should include a process to review the Document Catalog on a regular basis and manage rejected documents. That management should include reviewing documents that meet the criteria for purging and placing into a Hold Status those documents that should be excluded from the monthly purge processing.

Information Sources

- Related Procedure - None
- Legal Authority – None
- Attachments – [Document Purge Excel Spreadsheet](#)
- Links - None
- Contacts – [CTR Help Desk](#)
- [OSC Home Page](#)

Revisions

November 1, 2006. Removed language referencing the Knowledge Center and updated relevant links to Mass.gov/osc portal site.